



# COMMONWEALTH OF KENTUCKY JOB CLASS SPECIFICATION

## REVENUE DATA WORKFLOW SPECIALIST III

Job Number: 20001804

Job Code: 95470V130616

Job Group: 9500 - REVENUE

Job Established: 08/16/1999

Job Revised: 06/16/2013

Grade: 12 Salary (MIN - MID):

\$14,938-\$19,789 - Hourly

\$2,427.44-\$3,215.72 - 37.5 Hr. Monthly Salary

\$2,589.26-\$3,430.10 - 40 Hr. Monthly Salary

Special Entrance Rate:

NONE

NONE

NONE

### PROBATIONARY PERIOD:

This job has an initial and promotional probationary period of 6 months. For additional information refer to: <http://www.lrc.ky.gov/kar/101/001/325.htm>.

**CHARACTERISTICS OF THE JOB:** *Characteristics of a job are general statements indicating the level of responsibility and discretion of positions in that job classification. These are not intended to be an exhaustive list.*

Conducts advanced professional level examinations of tax returns and other documents that have been identified by the MFE including sales, withholding, accounts receivable, and unemployment insurance. Performs maintenance of mainframe data bases based on information discovered in workflow. Reviews and resolves out of balance transactions and applies payments properly. Reviews return data that does not pass system edits and makes necessary changes of adjustments. Issues refunds or determines tax due and issues assessment to the taxpayer. Reviews late returns and assesses penalties and interest accordingly. Assists in training new employees; and performs other duties as required.

### MINIMUM REQUIREMENTS:

#### **EDUCATION:**

Graduate of college or university with a bachelor's degree.

#### **EXPERIENCE:**

Must have three years experience in tax processing, tax administration, or business administration.

#### **Substitute EDUCATION for EXPERIENCE:**

NONE

#### **Substitute EXPERIENCE for EDUCATION:**

Additional experience in tax processing, tax administration, or business administration will substitute for the required education on a year-for-year basis.

#### **SPECIAL REQUIREMENTS (AGE, LICENSURE, REGULATION, ETC.):**

NONE

**EXAMPLES OF DUTIES OR RESPONSIBILITIES OF THE JOB CLASSIFICATION:** *Examples of duties or responsibilities are not to be construed as describing what the duties or responsibilities of any position shall be and are not to be construed as limiting the appointing authority's ability to assign, or otherwise alter the duties and responsibilities of a position. This is not intended to be an exhaustive list.*

Works assignments prioritized into ten or eleven work queues daily, with each queue presenting a unique situation. Conducts advanced professional level examinations of tax returns and other documents that have been identified by the MFE including sales, withholding, accounts receivable, and unemployment insurance. Reviews correspondence and makes decisions necessary to ensure accurate processing of tax information. Makes decisions concerning and processes returns with Jeopardy Assessments. Monitors work of temporary staff during peak income tax processing periods. Reviews out-of-balance transactions and makes decision as to how to apply remittances to proper accounts. Adjusts returns that do not pass system edits. Issues refunds or issues an assessment notification to the taxpayer based on return information. Prepare records and reports that explain adjustments made to the tax documents. Utilizes on-line systems to adjust existing accounts receivable and record case history in an on-line collections system. Reviews taxpayer correspondence and makes proper processing decisions based on information contained in the document. Requests additional information from the taxpayer either by written correspondence, phone or in person. Maintains knowledge of and works with all taxes in the workflow environment. Reviews pertinent information and publications to stay up to date on tax law processing changes. Assists in other areas of document processing. Serves as an assistant to the Branch Manager and makes decisions in his/her absence. Coordinates the work of other employees in the workflow area.

**UNIQUE PHYSICAL REQUIREMENTS:**

**TYPICAL WORKING CONDITIONS:** *Incumbents in the job will typically perform their job duties under these conditions.*

Incumbents working in this job title typically perform duties in a document processing center.

**ADDITIONAL REQUIREMENTS:**

Upon appointment, employees in this class may be required to maintain a valid driver's license and required to drive a licensed vehicle. This status may be necessary for the length of time in this class. If this is necessary it will be listed in the specific position description for that position. Applicants and employees in this job title may be required to submit to a drug screening test and background check. Applicants and employees in positions which perform job duties that may require contact with offenders in the custody or supervision of the Department of Corrections or with youth in the care, custody, or supervision of the Department of Juvenile Justice must meet qualifications pursuant to the federal Prison Rape Elimination Act, 28 C.F.R.115.17 and 115.317.

*THE COMMONWEALTH OF KENTUCKY DOES NOT DISCRIMINATE ON THE BASIS OF RACE, COLOR, RELIGION, SEX, NATIONAL ORIGIN, SEXUAL ORIENTATION OR GENDER IDENTITY, ANCESTRY, AGE, DISABILITY, POLITICAL AFFILIATION, GENETIC INFORMATION OR VETERAN STATUS IN ACCORDANCE WITH STATE AND FEDERAL LAWS.*